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Gas vs. Diesel —
When and Why!

NAFA President
Gordon West

automotive
FLEET®

CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

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Influencing the management of 5,072,000 cars and 2,209,000 light trucks and vans in business, leasing, rental, utility, government, police, and taxi fleets.

Page 28 — With a market one and a half times the size of the U.S., Western Europe is an attractive location for U.S.-based lessor expansion.

Page 56 — Using Isuzu Truck's Road Ready program, delivery is simplified because the bodies are pre-specified and not custom ordered.

On the Cover—NAFA President Gordon West presents his views on trends in the fleet industry. For details, see page 21.

Features

21 **The Emergence of the "Global" Fleet Manager**
NAFA President Gordon West discusses NAFA's first-ever strategic growth plan, and his views on the future of fleet management.

28 **U.S.-Based Lessors Increase Presence in Europe**
American leasing companies may be able to expand operations in the European fleet market by offering a broad array of vehicle management services.

33 **How to Get Vehicles Spec'ed and Priced Faster**
ARI's Computer Aided Pricing System (CAPS) guides its users through the process of specing and pricing vehicles.

34 **PHH Fleet America Charts Course for 1992 and Beyond**
In this AF interview, PHH Fleet America President Bill Adler talks about the company's strategic plans for growth and offers a retrospective on his first year as president.

44 **Municipal Public Service Vehicle Leasing on the Rise**
Leasing has become an attractive option for municipal public service fleets facing shrinking budgets.

48 **The Challenges Facing GE Fleet Services' New President**
Teresa LeGrand, GE Capital Fleet Services' new president, discusses how she plans to maintain the company's growth during a recession.

Truck/Van Section

56 **Isuzu Truck's Road-Ready Program Assists Dealers**
Isuzu Truck's new program is designed to assist dealers and fleet customers in acquiring pre-specified truck bodies from four body manufacturers.

60 **Medium-Duty Comparisons: Gas Versus Diesel**
A fleet manager discusses the pros and cons of gasoline versus diesel engines in trucks falling in the 9,000-14,000 lb. GVW range.

Departments

Letters	8	Used-Car Prices	75
Industry News	10	Products Services	76
Hotline	19	Gas Prices	78
Truck and Van News	68	Ad Index Calendar	79
Personnel Personals	70	Editorial	80
Leasing	71		

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U.S.-Based Lessors Increase Presence in Europe

With its large fleet leasing market, Europe provides an attractive business opportunity for many American leasing companies. Marketing full vehicle management services may be the key to gaining a competitive edge.

"The world is becoming more of an international and global scene—one marketplace, and I think Europe makes the most logical step for us to go to next," says Mike Zafirovski, GE Capital Fleet Services' senior vice president, finance and business development. "The fleet market is substantially larger in Western Europe as compared to the United States, so obviously we are studying the market and evaluating our options."

Western Europe has a lot to offer U.S.-based leasing companies interested in international expansion: a market at least one and a half times the size of the United States, a large number of business use vehicles, and reduced trade barriers and an improved intra-European business climate created by recent political changes, the most important being the maturation of the European Economic Community (EEC).

American-based fleet leasing companies have been scouting out business opportunities in Europe in recent years and have taken steps toward increasing their presence. While European leasing activity by U.S.-based companies is still in the early stages, significant steps have been taken toward creating a foothold on the Continent. Many of the large U.S.-based fleet leasing and management companies have plans for expanding their operations onto the European continent throughout the 1990s.

So far, most of the business activity by U.S.-based fleet leasing companies has occurred within the United Kingdom, where both PHH Corp. and United States Fleet Leasing have operations. Lease Plan Holding, based in Almere, The Netherlands, has operations in 12 European countries and is operating in the U.S. under Lease Plan U.S.A., and Lease Plan International.

The greatest opportunity for growth on the European continent lies in providing vehicle management and operating services, as opposed to providing assets, according to representatives of U.S.-based leasing companies interviewed by *Automotive Fleet*. Services such as fuel management, accident management, licensing and titling, and maintenance management allow U.S.-based leasing and management companies to be competitive in the European market.

Why Europe?

"The world is becoming more of an international and global scene—one marketplace, and I think Europe makes the most logical step for us to go to next," says Mike Zafirovski, GE Capital Fleet Service's senior vice president, finance and business development. "The fleet market is substantially larger in Western Europe as compared to the United States, so obviously we are studying the market and evaluating our options."

Western Europe offers an attractive

location to do business for corporations around the globe. With the formation of the EEC, more than 380 million consumers can be reached. Western Europe also offers a highly industrialized, modernized, and wealthy continent with a dynamic automotive sector. Another reason to look to Europe for international expansion: recent political changes in Eastern Europe will mean potential business opportunities in the near future.

"We can say to all the European companies doing business here in the states, 'We're your leasing company in Europe—why not give us a try here in the United States?'" says Don Kreft, president of Lease Plan International.

Besides the formation of the EEC, which links up the nations of Western Europe into a more unified and open market, economic and political conditions in Europe during the last 10 years have been more favorable to international business growth. The early 1980s saw liberalization of capital markets and the loosening of credit restrictions in the United Kingdom and other Western European nations. This created a healthy environment for the vehicle leasing industry to grow, especially in the United Kingdom.

During the first half of the 1980s, economic trends, as well as policies created by the Thatcher government in Great Britain, encouraged a "managerial revolution" throughout the United Kingdom, where corporations discovered the necessity of managing their operations more efficiently and cost effectively. This trend helped create an environment in the business community for more acceptance of third party services. Many corporations discovered that outsourcing fleet operating functions to a leasing company could result in increased efficiency in the management of their assets.

U.S.-based fleet leasing companies could also benefit from the expansion of other American corporations into European markets, especially when these corporations happen to be their clients back in the United States. For example, a leasing company that handles fleet management services for an American corporation may be able to use that relationship to gain new business when that corporation decides to expand into Europe. The reverse situation could also apply: a U.S.-based leasing company handling the leasing operations for a European-based company could be in a good position to negotiate an arrangement for handling that company's U.S. fleet management needs.

"We can say to all the European companies doing business here in the states, 'We're your leasing company in Europe — why not give us a try here in the United States?'" says Don Kreft, president of Lease Plan International. "They'll usually give us a try, if the parent company is doing business with us over there, especially if they send someone over here from Europe to be involved in the management of the company."

Lease Plan International handles fleet leasing and management services for Nestle, a Swiss corporation, in European countries and the United States. By the end of 1992, Lease Plan will be a major supplier of Nestle's U.S. fleet, which numbers in excess of 4,500 vehicles.

"What we'll do through our international coordination office is give a fleet that has operations in several different countries a discount based on its total number of vehicles throughout the world," Kreft says. "We're looking at the total picture."

Gaining a Foothold Through the United Kingdom

With liberalization of capital markets, loosening of credit restrictions, favorable policies of the Thatcher government, a common language, and a high percentage of business-use vehicles, the United Kingdom has presented the most attractive location for U.S.-based fleet leasing companies to gain a foothold on the European continent. Fleet leasing and management service opportunities abound, since company cars are perceived as an important part of an employee's remuneration, even more so than in the United States. In the United Kingdom, company cars are provided to employees three to four grades below comparable positions within companies in the United States.

PHH Corp. began its presence in the United Kingdom in 1972, and spent the next 10 years building up its operation. "We really didn't get going until early 1982 in the United Kingdom," says Joe Diedrich, senior vice president in charge of international operations. "I would call those first 10 years learning years. The market was pretty negative toward the types of vehicle management services that PHH is typically known for. Early in the 1980s, however, the markets changed dramatically. It also had to do with a bit of Thatcherism."

Beginning in the mid-1980s, PHH began expanding outside the United Kingdom. The first area of expansion was Ireland, then into France and Germany. PHH has plans for going into Spain and Italy during the early 1990s.

PHH has found success in the United Kingdom by offering a wide range of fleet operation services, such as fuel management, repair services, accident management, and other

services. The greatest success has come through fuel management services. PHH currently has 600,000 vehicles under fuel management programs in Europe.

"Our strategic focus in Europe is to add a strong focus on fuel management services to fleet leasing, because fuel is about three times the cost that it is in the United States and is really essential to vehicle management services," Diedrich says. "The cost of fuel over the lifecycle of a vehicle is equal to the cost of depreciation, so fuel management is a very important part of the traditional fleet or vehicle management service. Fuel management is primarily a card-based system that allows our customers to manage their fuel purchases much more efficiently from an administrative standpoint, and it allows them to monitor the fleet lifecycle much more effectively."

United States Fleet Leasing entered the United Kingdom market by acquiring a small company that had been providing maintenance for Ford Motor Credit Co. The USFL operation, called Ford Contract Motoring Management, Ltd. became fully operational in September 1991. USFL spent a year preparing for the opening of the operation.

"We had to go to the U.K. and find out how they do business, then make the modifications for our system to work over there," says Rich Scholz, a senior vice president with USFL. "What we've set up is a services company which is effectively the complete 'back room.' That means purchasing the vehicles, the license and titling function, maintenance of the vehicles — probably 98 percent is guaranteed maintenance — used-car sales, billing and collections, accounting, and customer service."

Both Diedrich and Scholz agree that placing locals in administrative positions within their U.K. operations has been a critical part of overcoming cultural barriers. A certain degree of nationalism exists, and British business people, like business people in other European countries, would rather conduct business with someone from their own country.

"We use nationals, and I think we're way ahead of the game by doing that," Scholz says. "For you to come in cold, you're just asking for trouble. We have an excellent general manager who had been general manager of British Car Contractors, Rover's leasing arm. He's very knowledgeable and very experienced in the fleet leasing business."

Nationalism also comes into play when considering vehicle choices among European nations. There is a strong preference toward purchasing vehicles made in their own countries. "There's a lot of nationalism as far as the types of cars that should be used," Kreft says. "If you're in Germany, they want to use German cars. If you're in France, it's best to use Peugeots or Renaults. You see very little of the other makes in corporate fleets."

What are Europeans Looking for?

What types of services do European companies look for from a fleet leasing and management company? Many European companies are looking for complete fleet management services from a leasing company. There is a trend within the European fleet market toward outsourcing as many fleet operations as possible. Many of the larger Europe-based fleet leasing companies have emphasized the asset side of the leasing business; an opening exists for lessors that can provide specific services, such as licensing and titling, accident management, and fuel management services, as well as entire fleet management packages.

The preponderance of negotiated leases in the United Kingdom and other Western European countries are closed-end leases, as opposed to the United States, where open-end leases are in the majority.

Leasing company representatives interviewed for this article cautioned against looking at Europe as one large fleet market. Each individual country has its own traditions, culture, language, tax system, business regulations, political and economic conditions, and other factors.

"I think it's dangerous to generalize," Zafirowski says. "The market maturation of fleet leasing and fleet management is very different on a country-by-country basis. The United Kingdom market, for example, is very mature and sophisticated. They're probably the closest to the United States in terms of fleet management and fleet leasing. Germany, on the other hand, has a huge company car and fleet market, but very few fleet management services the way we know them." o

UK Vehicle Leasing Business

Millions of Pounds*	1981	1982	1983	1984	1985	1986	1987	1988
Cars	222	256	296	338	583	814	1,249	1,738
Commercial vehicles	225	320	324	450	609	579	796	1,075

* As of press time, one British Pound was equivalent to $1.80 in U.S. dollars
Source: Equipment Leasing Association

UK Contract Hire/Leasing Fleet Volume In Units

	1984	1985	1986	1987	1988
Cars	231,396	290,326	376,232	462,755	607,460
Light vans and conversions	22,340	24,450	24,514	25,476	39,481
Commercial vehicles and tractors	22,064	24,328	29,331	33,553	36,614

Source: British Vehicle Rental and Leasing Association

USED-CAR PRICES

The following are average used-car prices for the period ending November 27,1991. Prices are based on wholesale activity at major dealers across the country. They are divided into three zones as indicated on the accompanying map. These averages are calculated electronically. They are based on clean cars only. Proper allowance should be made for upgrading sharp cars and proper deduction taken for fair cars. Automatic transmissions have been included in the averages of all models. This information is published in *Automotive Fleet* by special permission of *Automotive Market Report*.

Model	AVERAGE AUCTION PRICE Zone 1	Zone 2	Zone 3
89 BUICK SKYHAWK			
Coupe	5,325	5,380	5,252
Sedan	5,398	5,452	5,321
88 BUICK SKYHAWK			
Coupe	4,337	4,381	4,278
Sedan	4,400	4,444	4,338
90 BUICK SKYLARK			
Cust. Sedan	7,301	7,374	7,199
89 BUICK SKYLARK			
Cust. Sedan	6,197	6,259	6,110
90 BUICK CENTURY			
Cust. Sedan	7,894	7,973	7,783
89 BUICK CENTURY			
Cust Sedan	6,150	6,212	6,064
90 BUICK LESABRE			
Cust. Sedan	10,237	10,339	10,093
89 BUICK LESABRE			
Cust. Sedan	7,984	8,063	7,872
90 CADILLAC DEVILLE			
Coupe	16,585	16,751	16,353
Sedan	16,753	16,921	16,518
89 CADILLAC DEVILLE			
Coupe	13,595	13,732	13,405
Sedan	13,745	13,882	13,552
90 CADILLAC SEVILLE			
Sedan	17,058	17,228	16,818
89 CADILLAC SEVILLE			
Sedan	14,024	14,164	13,827
90 CHEVY BERETTA			
Coupe	7,334	7,407	7,231
89 CHEVY BERETTA			
Coupe	6,201	6,262	6,114
90 CHEVY CORSICA			
Hatchback 5 Dr	7,026	7,093	6,928
89 CHEVY CORSICA			
Hatchback 4 Dr	5,803	5,861	5,721
90 CHEVY CAVALIER			
Sedan	5,837	5,895	5,755
89 CHEVY CAVALIER			
Sedan	4,795	4,844	4,729
89 CHEVY CELEBRITY			
Sedan	5,530	5,586	5,453
88 CHEVY CELEBRITY			
Sedan	4,423	4,467	4,360
90 CHEVY CAPRICE			
Sedan	7,989	8,069	7,877
89 CHEVY CAPRICE			
Sedan	6,213	6,275	6,125
90 CHRYSLER LE BARON			
Sedan	8,844	8,931	8,719
89 CHRYSLER LE BARON			
Highline Sedan	5,953	6,011	5,869
90 CHRYSLER NEW YORKER			
Salon Sedan	10,554	10,659	10,405
89 CHRYSLER NEW YORKER			
Sedan	8,967	9,058	8,842
89 CHRYSLER FIFTH AVENUE			
Sedan	9,054	9,146	8,928
88 CHRYSLER FIFTH AVENUE			
Sedan	7,031	7,101	6,932
89 DODGE ARIES AMERICA			
Sedan	4,399	4,442	4,335
88 DODGE ARIES AMERICA			
Sedan	3,455	3,489	3,406
90 DODGE SHADOW			
Liftbk 5 Dr	5,999	6,058	5,915
89 DODGE SHADOW			
Liftbk 5 Dr	4,969	5,019	4,898
90 DODGE DYNASTY			
Sedan	7,956	8,036	7,845
90 FORD ESCORT			
Htchbk 4 Dr LX	5,202	5,253	5,127
89 FORD ESCORT			
Htchbk 4 Dr LX	4,201	4,243	4,141
90 FORD MUSTANG			
LX 4 Coupe	6,865	6,933	6,769
90 FORD TEMPO			
GL Sedan 4 Dr	6,010	6,069	5,925
89 FORD TEMPO			
GL Sedan 4 Dr	4,871	4,922	4,803
90 FORD TAURUS			
GL Sedan 4 Dr	8,306	8,390	8,191
89 FORD TAURUS			
GL Sedan 4 Dr	6,463	6,529	6,373
90 FORD CROWN VICTORIA			
Sedan	9,917	10,016	9,778
89 FORD CROWN VICTORIA			
Sedan	8,176	8,258	8,062
90 THUNDERBIRD			
Coupe	8,986	9,077	8,860
89 THUNDERBIRD			
Coupe	7,598	7,673	7,492
90 LINCOLN			
Town Car Sedan	16,711	16,878	16,476
Mark VII LSC Coupe	15,851	16,008	15,628
Continental Sedan	15,450	15,605	15,235
89 LINCOLN			
Town Car Sedan	12,306	12,428	12,132
Mark VII LSC Coupe	13,196	13,328	13,012
Continental Sedan	13,096	13,227	12,911
90 MAZDA 626			
LX Sedan 4 Dr	10,109	10,210	10,027
90 MERCURY COUGAR			
LS Coupe	9,646	9,742	9,509
89 MERCURY COUGAR			
LS Coupe	8,211	8,293	8,094
90 MERCURY TOPAZ			
GS Sedan 4 Dr	6,155	6,217	6,069
89 MERCURY TOPAZ			
GS Sedan 4 Dr	5,004	5,053	4,933
90 MERCURY SABLE			
GS Sedan 4 Dr	8,413	8,497	8,295
89 MERCURY SABLE			
GS Sedan 4 Dr	6,513	6,578	6,422
90 MERCURY GRAND MARQUIS			
GS Sedan	10,359	10,462	10,212
89 MERCURY GRAND MARQUIS			
GS Sedan	8,699	8,785	8,577
90 MITSUBISHI MIRAGE			
Sedan 4 Dr	6,349	6,412	6,297
89 MITSUBISHI MIRAGE			
Sedan 4 Dr	4,918	4,968	4,879
90 NISSAN MAXIMA			
SE Sedan	14,649	14,796	14,533
89 NISSAN MAXIMA			
SE Sedan	12,267	12,389	12,169
90 NISSAN SENTRA			
Sedan 2 Dr	5,421	5,474	5,377
89 NISSAN SENTRA			
Sedan 2 Dr	4,107	4,149	4,075
90 NISSAN STANZA			
XE Sedan	9,307	9,401	9,233
89 NISSAN STANZA			
Ntch 4 Dr	7,362	7,436	7,304
90 OLDS CIERA			
S Coupe	7,957	8,035	7,845
Sedan	8,039	8,119	7,927
89 OLDS CIERA			
Coupe	6,081	6,142	5,995
Sedan	6,150	6,212	6,064
90 OLDS CALAIS			
Sedan	6,489	6,555	6,398
89 OLDS CALAIS			
Sedan	5,652	5,708	5,573
90 OLDS CUTLASS SUPREME			
Coupe	8,813	8,901	8,690
89 OLDS CUTLASS SUPREME			
Coupe	7,147	7,219	7,048
90 OLDS 98 REGENCY			
Sedan	12,815	12,944	12,637
89 OLDS 98 REGENCY			
Sedan	9,900	9,997	9,760
89 PLYMOUTH RELIANT			
Sedan	4,376	4,420	4,315
88 PLYMOUTH RELIANT			
Sedan	3,455	3,489	3,406
90 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	5,982	6,042	5,898
89 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	4,969	5,019	4,898
89 PLYMOUTH GRAN FURY			
Salon Sedan	4,603	4,648	4,537
88 PLYMOUTH GRAN FURY			
Salon Sedan	3,614	3,649	3,562
90 ACCLAIM			
Sedan	6,709	6,776	6,614
90 PONTIAC SUNBIRD			
LE Sedan	6,219	6,282	6,133
SE Coupe	6,444	6,508	6,353
89 PONTIAC SUNBIRD			
LE Sedan	5,206	5,259	5,133
SE Coupe	5,346	5,400	5,272
90 PONTIAC 6000			
LE Sedan	7,807	7,885	7,698
89 PONTIAC 6000			
LE Sedan	5,808	5,866	5,726
90 PONTIAC GRAND AM			
LE Sedan	7,331	7,405	7,229
89 PONTIAC GRAND AM			
LE Sedan	6,129	6,190	6,043
90 PONTIAC BONNEVILLE			
LE Sedan	10,116	10,217	9,974
89 PONTIAC BONNEVILLE			
LE Sedan	7,826	7,906	7,717
90 PONTIAC GRAND PRIX			
Coupe	8,941	9,030	8,815
89 PONTIAC GRAND PRIX			
Coupe	7,197	7,269	7,096
90 SUBARU LEGACY			
Sedan 4 Dr	8,565	8,652	8,497
90 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	10,088	10,189	10,007
89 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	8,355	8,439	8,289
90 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	7,618	7,693	7,556
89 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	6,519	6,584	6,466
90 TOYOTA CRESSIDA			
Lux Sedan	15,273	15,425	15,151
89 TOYOTA CRESSIDA			
Lux Sedan	12,743	12,870	12,641
90 VOLKSWAGEN JETTA			
GL Sedan 4 Dr	8,413	8,497	8,346
89 VOLKSWAGEN JETTA			
Sedan 4 Dr	6,830	6,898	6,776
90 VOLVO			
240 DL Sedan	12,646	12,773	12,545
89 VOLVO			
240 DL Sedan	11,002	11,112	10,914

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GAS PRICES

City	UNLEADED GAS Cost Per Gallon Full-Serve	Self-Serve
Juneau, AK	175.9¢	152.9¢
Selma, AL	143.6	109.9
Tucson, AZ	127.6	94.2
Fresno, CA	147.9	103.9
Stamford, CO	142.3	130.1
Augusta, GA	139.9	98.6
Maui, HI	208.6	157.9
Cedar Rapids, IA	135.2	109.7
Lexington, KY	126.9	104.4
Billings, MT	140.2	116.6
New York City, NY	134.4	124.9
Tulsa, OK	139.9	102.9
Philadelphia, PA	136.0	117.6
San Antonio, TX	142.9	118.6
Madison, WI	141.2	116.9

The average U.S. full-serve gasoline price for the month of December was 137.8 cents per gallon.
The average U.S. self-serve gasoline price for the month of December was 115.4 cents per gallon.
Survey conducted during the first five working days of December 1991.
Supplied by Runzheimer International, Runzheimer Park, Rochester, WI.

PRODUCTS

their underground storage tanks, but with the Tank Monitor 2.1 and Tank Monitor 3.1 and the proper probes, tank owners can perform the required annual 0.1 gallon/hour tests. *Gilbarco.*

Circle 224 on Inquiry Card

DETECT DEADLY CARBON MONOXIDE with the Heads Up! detector. This fatal odorless gas can be found anywhere fossil fuels are being burned, and can cause sickness, headaches, or even death, as a result of the incomplete burning of gasoline in internal combustion engines. The detector can quickly detect any leakage, and will turn light gray if carbon monoxide is present. The detector will turn black if dangerous levels are reached, but will return to normal color after exposure to fresh air. An adhesive back makes for easy mounting. *Holz Enterprises.*

Circle 225 on Inquiry Card

DASH-MOUNTED CUP holder for GM trucks combines the two-tone look of original equipment with a special cooling function. The Bullett Cup Holder mounts on the dash around the air vents with double-sided tape, using cool air from the air conditioning system to keep drinks chilled. The injection-molded holder accommodates standard beverage cans or large paper cup, while retaining full use of the vents for cabin cooling. *Bullett Engineering.*

Circle 226 on Inquiry Card